

# KUPPS Email & Accounting Code Profile Defaults



The screenshot shows the 'Email Preferences' page for user Jared Aistrup. The page is divided into sections: Administration & Integration, Shopping, Carts & Requisitions, and a section for Cart/PR rejected/returned. A dropdown menu is open for 'Contract XML Import Warning Notice', showing options: None (Default), Email, Notification, Email & Notification, and None (Default). A red arrow points to the 'Email & Notification' option.

The email notification and accounting code defaults in KUPPS can be customized to the preference of individual users. This requires a change in the user profile.

**1 Email Preferences.** KUPPS is configured to send email notifications in response to different events. Users can control if certain email notices are sent. To change an email setting:

1. Navigate to Profile >> User Settings >> Email Preferences.
2. Click on the dropdown box.
3. Set the dropdown box to your preference (Email, Notification, Email & Notification).
4. Click the **Save** button when done.

To determine what event triggers an email notice, hover over the title of the notification and a help box window will appear that defines when the notice is sent.

The screenshot shows the 'Custom Field and Accounting Code Defaults' page. It features a table with columns for Header (int.), Header (ext.), Codes, and Code Favorites. Below the table is an 'Add' button. A red arrow points to this button. Below the 'Add' button is a table titled 'Accounting Codes' with columns: Business Unit, Speed Chart, Account, Fund, Department, Project, Budget Reference, CF1, KUJA Account (Oper Unit), KURES Department Reimbursable, and KURES Project Reimbursable. A red arrow points to the 'Add' button in this table.

**2 Default Accounting Codes.** KUPPS users can preset default accounting codes that will populate each new requisition. These defaults are typically most useful for KUPPS users that do not regularly work with university accounting codes and make repeat orders. To create default accounting code favorites:

1. Navigate to Profiles >> Purchasing >> Custom Fields >> Code Favorites.
2. Click the **Add** button.
3. This opens the **Accounting Codes** edit tool.
  - Give the default setting a Nickname.
  - Check the Default checkbox.
  - Enter all default accounting code values.
  - Click the **Save** button.
4. Verify the settings for the default accounting codes are correct. Click the **edit** button to change the saved settings as necessary.

All future will requisitions will now automatically populate the default accounting code values set for the user. If the default accounting codes are not correct for a particular requisition, anyone within the workflow can update the code settings from within the requisition.

The screenshot shows the 'Accounting Codes' edit tool. It has a 'Nickname' field with 'MyTypicalCodes' and a checked 'Default' checkbox. Below are input fields for Business Unit (UKANS), Speed Chart (NONE), Account (137100), Fund (099), Department (2100000), Project, Budget Reference (2014), and CF1. A red arrow points to the 'Save' button at the bottom right.